



## OFFER AND AWARD

ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

SOLICITATION NO. RFP NO. ED07-0037

### OFFER

The Undersigned hereby offers and agrees to furnish the materials, service(s) or construction in compliance with all the terms, conditions, specifications and amendments in the solicitation.

Company Name VERITI CONSULTING LLC

8111 E. THOMAS RD., SUITE 120

Street Address

SCOTTSDALE AZ 85251

City

State

Zip Code

Telephone Number: 602. 229. 1280

Offeror's Arizona Transaction (Sales) Privilege Tax License Number:

Offeror's Federal Employer Identification Number:

Name of Person Authorized to Sign Offer ELIZABETH MONTY

MANAGING DIRECTOR

Title of Authorized Person

Elizabeth B Monty 4/5/07

Signature of Authorized Person

Date of Offer

Facsimile Number: 602. 229. 1281

N/A

20-4060422

Acknowledgement of Amendment(s):  
(Offeror acknowledges receipt of amendment(s) to the Solicitation for Offers and related documents numbered and dated

Amendment No. Date

Amendment No. Date

### ACCEPTANCE OF OFFER AND CONTRACT AWARD

(For State of Arizona Use Only)

Your Offer, dated 4/5/07, is hereby accepted as described in the Notice of Award. You are now bound to perform based upon the solicitation and your Offer, as accepted by the State.

This Contract shall henceforth be referred to as Contract Number ED07-0037-1

You are hereby cautioned not to commence any billable work or provide any material, service or construction under this contract until you receive an executed purchase order, contract release document, or written notice to proceed, if applicable.

#### State of Arizona

Awarded this 16th day of July 2007

Douglas C. Peeples  
Douglas C. Peeples, MBA, CPPB, CPCM  
Procurement Administrator

**SECTION 2**  
**SPECIAL TERMS AND CONDITIONS**

ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

**SOLICITATION NO. RFP NO.ED07-0037**

- (5) Shipping and payment terms (e.g., shipment number and date of shipment, prompt payment discount terms).
- (6) Name and address of Contractor official to whom payment is to be sent (must be the same as that in the Contract or in a proper notice of assignment).
- (7) Name (where practicable), title, phone number, and mailing address of person to be notified in the event of a defective invoice.
- (8) Any other information or documentation required by the Contract (such as evidence of shipment).

B. Submittal of an invoice constitutes Contractor's certification that services have been delivered as specified on the invoice in accordance with the Contract.

C. Submit invoices to the following :

To the eligible recipient agency that tendered the purchase order for the contract services (do not invoice ADE). The eligible recipient agency will pay the Contractor upon approval of acceptable invoice.

15. Address to which Contractor payment(s) should be mailed, if different than that listed on the Offer and Award Form.

\_\_\_\_\_  
(Company Name)

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(City & State)

\_\_\_\_\_  
(Zip Code)

**16. Contract Administration**

A. Contractor representative to contact for contract administration purposes:

ELIZABETH MONTY, MANAGING DIRECTOR  
(Name and Title)

8111 E THOMAS RD., SUITE 120  
(Street Address)

SCOTTSDALE, AZ  
(City & State)

85251  
(Zip Code)

TEL. 602.229.1280

FAX 602.229.1281

(Telephone and fax Numbers)

LM@VERITI CONSULTING.COM  
(E-Mail Address)

**ATTACHMENT 6.1**  
**PRICES/DELIVERY SCHEDULE**  
**SOLICITATION No. ED07-0037**

**DESCRIPTION**

**HOURLY RATE**

School Receiver Services Required by this Solicitation

\$ 175.00

Not to exceed hourly rate. Actual price to be determined by mutual agreement between school district and receiver.

If payment is made within 30 calendar days after acceptance of goods and/or services, the above quoted price, excluding sales tax, shall be discounted by 2%. (Refer to Uniform Instructions To Offerors for discount requirements.)

**Notice:** If the transaction privilege (sales) taxes are not described and itemized on the offer, the State will assume that the price(s) offered includes all applicable taxes.





ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

SOLICITATION NO. RFP NO. ED07-0037

**OFFER AND AWARD**

**OFFER**

The Undersigned hereby offers and agrees to furnish the materials, service(s) or construction in compliance with all the terms, conditions, specifications and amendments in the solicitation.

Company Name

**The Professional Group Public  
Consulting, Inc**

212 W Superstition Blvd, Suite 103-B

Street Address

Apache Junction, AZ 85220

City State Zip Code

Telephone Number: 480-797-6873

Name of Person Authorized to Sign Offer

Caroline Brackley

President

Title of Authorized Person

*Caroline Brackley*

4/6/07

Signature of Authorized Person

Date of Offer

Facsimile Number: 480-671-8213

Offeror's Arizona Transaction (Sales) Privilege Tax License Number:

Offeror's Federal Employer Identification Number: 37-1459972

Acknowledgement of Amendment(s):

*(Offeror acknowledges receipt of amendment(s) to the Solicitation for Offers and related documents numbered and dated*

Amendment No. Date

Amendment No. Date

**ACCEPTANCE OF OFFER AND CONTRACT AWARD**

*(For State of Arizona Use Only)*

Your Offer, dated 4/6/07, is hereby accepted as described in the Notice of Award. You are now bound to perform based upon the solicitation and your Offer, as accepted by the State.

This Contract shall henceforth be referred to as Contract Number **ED07-0037-2**

You are hereby cautioned not to commence any billable work or provide any material, service or construction under this contract until you receive an executed purchase order, contract release document, or written notice to proceed, if applicable.

**State of Arizona**

Awarded this 16th day of July 2007

*Douglas C. Peebles*  
Douglas C. Peebles, MBA, CPPB, CPCM  
Procurement Administrator

## SECTION 2 SPECIAL TERMS AND CONDITIONS

ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

SOLICITATION NO. RFP NO.ED07-0037

- (5) Shipping and payment terms (e.g., shipment number and date of shipment, prompt payment discount terms).
  - (6) Name and address of Contractor official to whom payment is to be sent (must be the same as that in the Contract or in a proper notice of assignment).
  - (7) Name (where practicable), title, phone number, and mailing address of person to be notified in the event of a defective invoice.
  - (8) Any other information or documentation required by the Contract (such as evidence of shipment).
- B. Submittal of an invoice constitutes Contractor's certification that services have been delivered as specified on the invoice in accordance with the Contract.

C. Submit invoices to the following :

To the eligible recipient agency that tendered the purchase order for the contract services (do not invoice ADE). The eligible recipient agency will pay the Contractor upon approval of acceptable invoice.

15. Address to which Contractor payment(s) should be mailed, if different than that listed on the Offer and Award Form.

**The Professional Group Public Consulting, Inc**

(Company Name)

**212 West Superstition Blvd, Suite 103B**

(Street Address)

**Apache Junction, AZ 85220**

(City & State)

(Zip Code)

### 16. Contract Administration

- A. Contractor representative to contact for contract administration purposes:

**Caroline Brackley, President**

(Name and Title)

**212 West Superstition Blvd, Suite 103B**

(Street Address)

**Apache Junction, AZ 85220**

(City & State)

(Zip Code)

**480 797-6873**

**480 671-8213**

(Telephone and fax Numbers)

**caroline@pgpc.org**

(E-Mail Address)

**ATTACHMENT 6.1**  
**PRICES/DELIVERY SCHEDULE**  
SOLICITATION No. ED07-0037

**DESCRIPTION**

**HOURLY RATE**

School Receiver Services Required by this Solicitation

\$ 100.00

Not to exceed hourly rate. Actual price to be determined by mutual agreement between school district and receiver.

If payment is made within 30 calendar days after acceptance of goods and/or services, the above quoted price, excluding sales tax, shall be discounted by 0 %. (Refer to Uniform Instructions To Offerors for discount requirements.)

Notice: If the transaction privilege (sales) taxes are not described and itemized on the offer, the State will assume that the price(s) offered includes all applicable taxes.





## OFFER AND AWARD

ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

SOLICITATION NO. RFP NO. ED07-0037

### OFFER

The Undersigned hereby offers and agrees to furnish the materials, service(s) or construction in compliance with all the terms, conditions, specifications and amendments in the solicitation.

Company Name Warfield & Company, CPA's

14555 N. Scottsdale Rd #340

Street Address

Scottsdale AZ 85254

City State Zip Code

Telephone Number: 480-948-1711

Name of Person Authorized to Sign Offer  
Lawrence J. Warfield, CPA

Principal

Title of Authorized Person

Signature of Authorized Person

Date of Offer

Facsimile Number: 480-951-3887

Offeror's Arizona Transaction (Sales) Privilege Tax License Number: N/A

Offeror's Federal Employer Identification Number: 86-0721778

Acknowledgement of Amendment(s):  
(Offeror acknowledges receipt of amendment(s) to the Solicitation for Offers and related documents numbered and dated

Amendment No. Date

Amendment No. Date

## ACCEPTANCE OF OFFER AND CONTRACT AWARD

(For State of Arizona Use Only)

Your Offer, dated 4/1/07, is hereby accepted as described in the Notice of Award. You are now bound to perform based upon the solicitation and your Offer, as accepted by the State.

This Contract shall henceforth be referred to as Contract Number ED07-0037-3

You are hereby cautioned not to commence any billable work or provide any material, service or construction under this contract until you receive an executed purchase order, contract release document, or written notice to proceed, if applicable.

### State of Arizona

Awarded this 16th day of July 2007

Douglas C. Peebles  
Douglas C. Peebles, MBA, CPPB, CPCM  
Procurement Administrator

**SECTION 2**  
**SPECIAL TERMS AND CONDITIONS**

ARIZONA DEPARTMENT OF EDUCATION  
Procurement Section  
1535 West Jefferson Street, Bin #37  
Phoenix, Arizona 85007

**SOLICITATION NO. RFP NO.ED07-0037**

(5) Shipping and payment terms (e.g., shipment number and date of shipment, prompt payment discount terms).

(6) Name and address of Contractor official to whom payment is to be sent (must be the same as that in the Contract or in a proper notice of assignment).

(7) Name (where practicable), title, phone number, and mailing address of person to be notified in the event of a defective invoice.

(8) Any other information or documentation required by the Contract (such as evidence of shipment).

B. Submittal of an invoice constitutes Contractor's certification that services have been delivered as specified on the invoice in accordance with the Contract.

C. Submit invoices to the following :

To the eligible recipient agency that tendered the purchase order for the contract services (do not invoice ADE). The eligible recipient agency will pay the Contractor upon approval of acceptable invoice.

15. Address to which Contractor payment(s) should be mailed, if different than that listed on the Offer and Award Form.

\_\_\_\_\_  
(Company Name)

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(City & State) (Zip Code)

16. **Contract Administration**

A. Contractor representative to contact for contract administration purposes:

\_\_\_\_\_  
Jennifer Bailey, Office Manager

(Name and Title)

\_\_\_\_\_  
14555 N. Scottsdale Rd. #340

(Street Address)

\_\_\_\_\_  
Scottsdale, AZ 85254

(City & State) (Zip Code)

\_\_\_\_\_  
480-948-1711 x 3710 480-951-3887

(Telephone and fax Numbers)

\_\_\_\_\_  
jbailey@warfieldcpas.com

(E-Mail Address)



**ATTACHMENT 6.1**  
**PRICES/DELIVERY SCHEDULE**  
**SOLICITATION No. ED07-0037**

**DESCRIPTION**

**HOURLY RATE**

School Receiver Services Required by this Solicitation

\$ 187.50

Not to exceed hourly rate. Actual price to be determined by mutual agreement between school district and receiver.

	<u>Regular Rate</u>	<u>Discounted Rate</u>
Lawrence J. Warfield	\$250.00	\$187.50
CPA - Manager	\$200.00	\$150.00
CPA - 5 years experience	\$150.00	\$112.50
CPA - less than 5 years experience	\$110.00	\$ 82.50
Staff - 5 years experience	\$ 95.00	\$ 71.25
Staff - less than 5 years experience	\$ 80.00	\$ 60.00
Paralegal services	\$125.00	\$ 93.75
Administrative	\$ 42.00	\$ 31.50
Information technology (computer resources)	\$110.00	\$ 82.50

If payment is made within 15 calendar days after acceptance of goods and/or services, the above quoted price, excluding sales tax, shall be discounted by 2%. (Refer to Uniform Instructions To Offerors for discount requirements.)

**Notice: If the transaction privilege (sales) taxes are not described and itemized on the offer, the State will assume that the price(s) offered includes all applicable taxes.**

## ATTACHMENT 6.4 BUSINESS OWNERSHIP CLASSIFICATIONS

NOTE: THE FOLLOWING REQUESTED INFORMATION IS FOR DATA COLLECTION PURPOSES ONLY

Name of Organization:	WARFIELD & COMPANY, CPA'S		
Contact Person:	Lawrence J. Warfield		
Contact Phone:	480-948-1711	Fax:	480-951-3887
Email:	lwarfield@warfieldcpas.com		
Address: Street/PO Box:	14555 N. Scottsdale Rd #340		
City, State, Zip:	Scottsdale AZ 85254		

**Primary Business Type (Select One Only):**

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> A Authorized Distributor | <input type="checkbox"/> E Factory Representative | <input checked="" type="checkbox"/> I Service Firm |
| <input type="checkbox"/> B Broker                 | <input type="checkbox"/> F Jobber/Wholesaler      | <input type="checkbox"/> J Surplus Dealer          |
| <input type="checkbox"/> C Construction Firm      | <input type="checkbox"/> G Manufacturer           | <input type="checkbox"/> K Health Care Provider    |
| <input type="checkbox"/> D Consulting Firm        | <input type="checkbox"/> H Retailer               | <input type="checkbox"/> L Other _____             |

**Business Ownership Type (Select Only Those that Apply to Majority Owner(s)).**

**Business Size:**

- ☐ 1 Non-Small  
☒ 2 Small Business (Per ARS §41-1001.14)

**Business Owner Type (Check all that apply):**

- ☐ 3 Woman Owned Business  
☐ 4 Owned By Disabled Individual (Per ARS §41-1492)  
☐ 5 Minority Owned Business (Per 15 CFR §1400.1(a))

**If "Minority Owned," please identify:**

- ☐ 6 African-American  
☐ 7 Asian-American  
☐ 8 Hispanic-American  
☐ 9 Native American


**APPLICANT CERTIFICATION:**

**I CERTIFY THAT:**

- I, as an officer of this organization, or per the attached letter of authorization, am duly authorized to certify the information requested herein;
- To the best of my knowledge the elements of information provided herein are accurate and true as of the date; and
- My organization shall comply with all State and Federal Equal Opportunity and Non-Discrimination requirements and conditions of employment in accordance with ARS §Title 41 Chapter 9, Article 4 and Executive Order No. 99-4 dated February 8, 1999.

Lawrence J. Warfield, CPA  
 Printed or Typed Name:

Principal/President  
 Title:

  
 Signature:

29 March 2007  
 Date